

# BoutiQue:

what sells  
**best** now?

TOGETHER WITH THE WORLDWIDE BOUTIQUES SECTION, EXTENSIVE INTERNATIONAL SURVEYS ARE ONE OF INTIMAGROUP/ NETWORK DESSOUS'S DEFINITIVE AREAS OF EXPERTISE. THIS IS PRECISELY WHY WE DECIDED TO EXPAND OUR AREA OF INTEREST FOR THE SECOND EDITION OF THIS ANNUAL SURVEY AND INTERVIEW OVER **500 RETAILERS ACROSS A TOTAL OF 10 COUNTRIES** – A FIRST FOR THE INDUSTRY.

YOU WILL NOTICE HOW 2014 PROVED TO BE A MIXED YEAR ACROSS THE GLOBE, WITH POSITIVE RESULTS HERE IN NORTH AMERICA, AS WELL AS ACROSS THE POND IN THE UK AND IRELAND. RESULTS WERE SOMEWHAT MIXED FOR OUR GERMAN FRIENDS AND MORE DISAPPOINTING IN SOUTHERN EUROPE, EVEN WORRYING FOR RUSSIA AND UKRAINE. IT WILL BE INTERESTING TO IDENTIFY THE UNIQUE CHARACTERISTICS OF EACH COUNTRY IN TERMS OF PRODUCT OFFER, BEST SELLERS AND MOST POPULAR BRANDS. THE RESULTS OF THIS SURVEY PROVIDE A WEALTH OF INFORMATION FOR ALL PROFESSIONS WITHIN THE INDUSTRY, WHICH WERE ALSO PRESENTED IN DETAIL AS PART OF A CONFERENCE, HELD AT THE SALON INTERNATIONAL DE LA LINGERIE IN PARIS IN JANUARY.

# What sells best? in France?

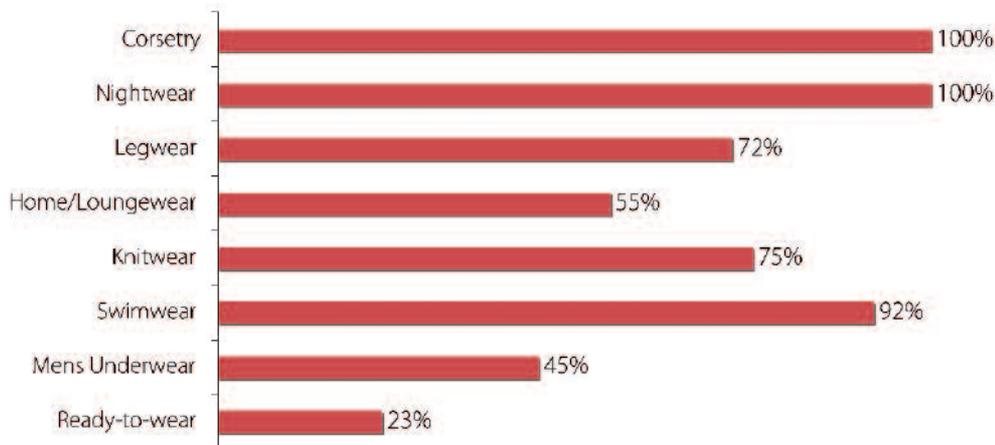
THIS YEAR, INTIMA MAGAZINE INTERVIEWED 100 BOUTIQUES FROM THE *TOP 100 MEILLEURES BOUTIQUES DE FRANCE* CONTEST, ORGANIZED IN COLLABORATION WITH THE LINGERIE SECTOR'S LEADING BRANDS (FIND OUT MORE INFORMATION IN THIS EDITION)... TOGETHER WITH THESE BOUTIQUES, IT WAS A GREAT OPPORTUNITY TO REVIEW 2014 AND FIND OUT WHETHER ANY NEW TRENDS HAVE EMERGED, DESPITE THE ECONOMIC CLIMATE STILL BEING SOMEWHAT GLOOMY. SO WHICH CATEGORIES ARE RESISTING THE CRISIS? WHICH BRANDS ARE AT THE TOP OF THEIR GAME? AND WHAT CAN WE EXPECT FOR 2015?

## What's Hot?

Unsurprisingly, corsetry still reigns for lingerie boutiques in France counting for more than half of a store's annual turnover. A wide range of iconic brands represents the offering, including specialists in categories such as plus size and, more recently, shapewear – the two categories that scored highest sales this year. Despite a unanimous presence in French boutiques, nightwear represented just 13% of sales; where refined pieces made from quality materials – like baby dolls and négligés – are struggling to find their audience, dressing gowns and cozy pajamas made up for a sweet start to the season. Knitwear, however, remains

stable for the most part, with a small increase thanks to some multifunctional pieces taking you from one season through to the next. Legwear is stocked by 72% of the boutiques interviewed and has seen a fall in sales for more than half of the panel. Menswear is selling steadily across the 45% of boutiques that offer a selection. Swimwear gathered mixed reviews from stores for 2014, though it remains a surefire category, guaranteeing almost a third of sales for the year. Finally, ready-to-wear and accessories remain rather marginal categories, offered in just 20% of boutiques, though sales are stable – whereas erotic lingerie sees promising growth and is sold in 40% of our interviewed stores.

WHO SELLS WHAT?



## Who's Top?

Once again, Lise Charmel top the charts for CORSETRY, followed in hot pursuit this year by Aubade, then tying with the same score, Simone Pérele and Wacoal. With truly functional styles that are becoming increasingly prettier, specialists in PLUS SIZES are really on a roll; PrimaDonna is without doubt the most popular, followed by French specialists Empreinte and then British brand Freya. Wacoal remains the undisputed leader in SHAPEWEAR, having seen excellent performances in store this year. As for SPECIALIZED CORSETRY, Anita is the brand of reference for clients seeking maternity styles, nursing bras and post-surgery undergarments, as well as sports bras. Marjolaine holds on to the top spot for nightwear whereas Le Chat comes top for LOUNGEWEAR/HOMEWEAR sales, followed by Canal and Twin-Set, the latter confirming the top spot also in READY-TO-WEAR, a category stocked by few in France. As for KNITWEAR – the category appearing least affected by the crisis – Italian Oscarito is by far the most cited brand, followed by a second Italian brand, Lisanza. Regarding LEGWEAR, Wolford takes center stage followed this year by French brand Gerbe. The most cited brands for the MENSWEAR offer were Hom, then Aubade Men.

## What styles?

Just as for ready-to-wear, the flagship color for corsetry this winter is blue in all its shades, with a particular tendency for sky blue and navy. In general, sober but chic colors are safe bets for customers, such as black, gray and various shades of nude. As for fabrics, customers opt for finer materials such as lace, silk, and wool and silk blends, whereas overly worked styles that are often more expensive tend to be more difficult to sell than timeless basics. Practicality and fit seem to be a reoccurring theme for the season, as the economic situation might

## BEST SELLERS

CORSETRY Lise Charmel  
 NIGHTWEAR Marjolaine  
 LOUNGEWEAR Le Chat  
 LEGWEAR Wolford  
 KNITWEAR Oscarito  
 MENS UNDERWEAR HOM  
 PLUS SIZE PrimaDonna  
 SHAPEWEAR Wacoal  
 EROTIC LINGERIE Aubade  
 MATERNITY Anita  
 READY-TO-WEAR Twin-Set  
 SPORTSWEAR Anita

dictate, but sexy lingerie and indeed erotic lingerie are adding a touch of caprice and fancy. Somewhat demonized by the phenomenon that was triggered by EL James' Fifty Shades of Gray trilogy, lingerie is now free to personify fantasies, presumably those of women, and indeed they sell very well! Offered by almost half of the boutiques that took part in this survey, it's noted as the top impulse buy. In addition to specialist brands for this category, boutiques mention the successes of Aubade's Boîtes à Désir.

## A Penny for your Thoughts...

Counting some of France's top lingerie stores, retailers interviewed for this survey reported mixed results for 2014 with more than half of them (54%) noting a decrease in turnover, in some cases resulting to be quite significant. Many have complained of high levels of inventory, blaming brands for unfair trade policies that favor e-commerce sites. This explains why almost half of respondents say they want to reduce their number of brands on offer for 2015 to concentrate on only those more promising; a decision that will also apply to brands within the same group.

# What sells best? in Italy?

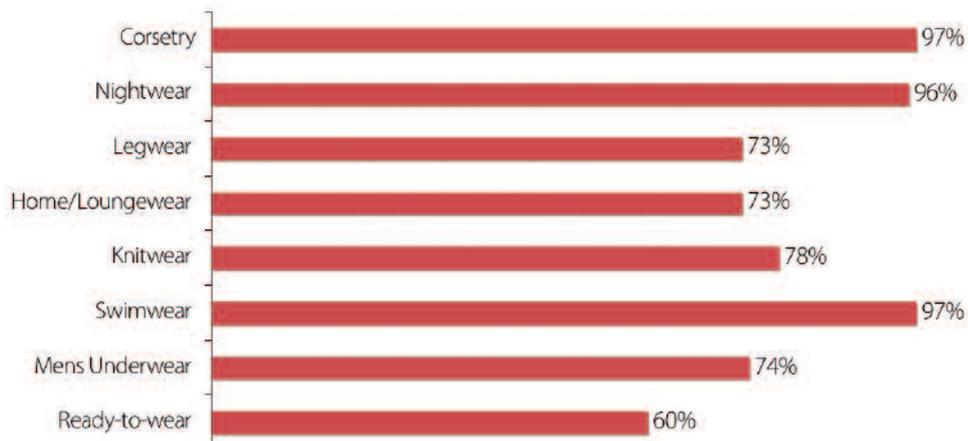
LINEA INTIMA, THE ITALIAN MAGAZINE FROM INTIMAGROUP, INTERVIEWED 100 MULTI-BRAND BOUTIQUES FROM THEIR NATIONAL CONTEST *LE STELLE DELL'INTIMO*, TAKEN FROM ALL OVER THE COUNTRY. THEY GAVE US AN INSIGHT INTO THE ITALIAN PREMIUM MARKET AND THE MOST DYNAMIC BRANDS IN THE INDUSTRY.

## What's Hot?

It's not corsetry, but swimwear that brings in the most revenue for Italian stores! Offered by almost all retailers, swimwear was the most dynamic category in 2014, with higher sales for 43% of our sample. Another defining feature of the Italian market was the weight of *dessus-dessous* (innerwear as outerwear), and ready-to-wear, offered by more than half of boutiques and apparently less affected by the crisis, with less competition than traditional corsetry, which has seen a drop by more than half of those interviewed. The results are much better for categories relating to support, a real spearhead for independent retailers in Italy, with 57% of stores showing good performances for bigger cups and plus sizes, as well as shapewear, with 48% enjoying stable sales and 34% an increase.

Mainly fashion-focused, just 14% of stores offer sports, maternity and post-surgery underwear. The same can be said for erotic lingerie, which instead can be found in many a new specialist store. Due to a rather mild fall, "cozy" products such as nightwear, homewear and legwear have been on the decline for half of those boutiques interviewed, unlike knitwear and *dessus-dessous*, sold by 78% of stores and gaining ground reporting either stable sales (54%) or indeed an increase (21%). For the 60% of stores offering ready-to-wear, results are also positive with shops experiencing either stability (39%) or a growth in sales (38%), a trend that is also reflected in accessories, increasingly more available in Italian boutiques. As for the mens offer, despite being sold by 74% of our respondents, sales were either stable or on a decline.

WHO SELLS WHAT?



## Who's Hot?

Already sitting at the top of the charts for 2013, Chantelle remains number one for CORSETRY. Twin-Set follows and Paladini take third place, whose popularity is increasing thanks to the Paladini n°9 line. French brands lead the way for PLUS SIZE lingerie, with Chantelle once again on top, followed by Simone Pérèle and Maison Lejaby who, with Elixir, is reaping the benefits of its style makeover. Chantelle steals the spotlight from Wacoal this year in SHAPEWEAR, followed by Spanish Janira, Imec and Wolford. An undisputed leader in NIGHTWEAR, Paladini takes first place followed by Twin-Set and then Happy People, the latter two very much appreciated for their fashionable style and excellent value. Just as in 2013, Twin-Set is the acclaimed brand for LOUNGEWEAR, seeing Paladini tie with Pepita in second place, who is riding the wave of "easywear". Third place goes to La Fabbrica del Lino, identified by stores in 2013 as a brand to look out for and which therefore proves to have been a good choice. For KNITWEAR, Oscalito just outdoes Lisanza, followed by Twin-Set, who is number one for READY-TO-WEAR and ACCESSORIES. Wolford leads the top three for LEGWEAR, completed by Oroblu and Girardi. For MENSWEAR, this year Julipet is favorite, followed by Perofil and Emporio Armani.

## What styles?

Even though an array of bright and intense greens, reds, yellows or burgundies sit proudly in the window displays of this country of fashion, it is mostly neutral shades and black that end up being taken to the cash desk. These shades are favored in simple models that are invisible

**BEST SELLERS**

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 LOUNGEWEAR Twin-Set  
 LEGWEAR Wolford  
 KNITWEAR Oscalito  
 MENS UNDERWEAR Julipet  
 PLUS SIZE Chantelle  
 SHAPEWEAR Chantelle  
 EROTIC LINGERIE Trasparenze  
 MATERNITY Anita  
 READY-TO-WEAR Twin-Set  
 SPORTSWEAR Anita

under clothing, due to reduced spending power and the rise in fashion lines sold at a number of multi-brand chains throughout the country. As for fabrics, the demand for natural fibers has been heard, both for their feel and comfort with a preference for cotton, but also modal, cashmere or silk mixes in high-end products.

## A Penny For Your Thoughts...

2014 ends much like the previous year, with business down for 43% of boutiques. However, those declaring a rise in sales were far more numerous with 21% declaring better results compared to just 10% in 2013. In this challenging climate, 20% of boutiques want to cut the number of brands they stock in 2015 and nearly a third say that they want to change their brand portfolio, focusing on those who can justify their price point with real perceptible quality by the customer. This does not necessarily mean compromising the range, however, as confirmed by 2014's best sellers.